

Kazakhstan Footwear Overseas Market Analysis Report

□ Target Country: Kazakhstan □ Main Category: Footwear □ Report Date: June 22, 2026

Kazakhstan Footwear Core Conclusions

The Kazakhstan footwear market has an annual consumption scale of approximately 48 million pairs, with import dependency consistently above 85%. China remains the largest supplier, holding about 65% market share. In H1 2026, demand for athletic leisure shoes grew by 12%, but tenge exchange rate volatility and localization industrial policies pose dual challenges for importers. The market shows a pattern of stable volume with rising prices, while mid-to-low-end segment competition intensifies.

Annual total imports: approx. 41 million pairs ↑3.2%

China supply share: approx. 65% (largest source country)

Local production share: less than 12% ▲ Highly import dependent

Source: Kazakhstan National Bureau of Statistics, 2026 Q1 Trade Brief; General Administration of Customs of China, April 2026 data

Supply and Demand Fundamentals

Kazakhstan's footwear consumption is mainly import-driven, with local annual production of only about 5.5 million pairs, creating a supply-demand gap of approximately 42.5 million pairs. Urban residents account for about 72% of consumption, driven by athletic and leisure scenarios. Below is the supply-demand balance overview for 2025 (2026 Q1 data uses previous values):

Indicator	Value	YoY Change
Local production	approx. 5.5 million pairs	+2.1%
Imports	approx. 41 million pairs	+3.2%
Exports (re-exports)	approx. 1.6 million pairs	-1.5%
Apparent consumption	approx. 44.9 million pairs	+3.0%

Source: Kazakhstan National Bureau of Statistics, 2025 Annual Report; 2026 Q1 uses previous values, no latest public data

China Market Status

China's footwear exports maintained moderate growth in H1 2026, with exports to Central Asia growing faster than the overall rate. Domestic shoe material costs stabilized, and capacity utilization rates in major production areas like Wenzhou and Jinjiang remained at about 78%. Kazakhstan is the largest destination for Chinese footwear exports to Central Asia.

China total footwear exports (Jan-May 2026): approx. 21.8 billion USD ↑4.1%

Footwear exports to Kazakhstan: approx. 380 million USD ↑6.5%

Main production area operating rate: approx. 78% (Wenzhou/Jinjiang)

Source: General Administration of Customs of China, May 2026 Monthly Statistical Bulletin; 生意社, June 2026 Light Industry Section

Kazakhstan Market Status

Kazakhstan's footwear retail is centered in Almaty and Astana, which together account for about 55% of consumption. The average CIF price for imported footwear is about 8.5 USD per pair, with retail markups generally ranging from 80% to 150%. Turkish and Russian brands have a certain share in the mid-to-high end market, but Chinese products still hold an absolute advantage in the price-value segment.

Main source countries: China 65%, Turkey 12%, Russia 8%, Uzbekistan 5%

Average CIF price of imported shoes: approx. 8.5 USD/pair

Retail market size: approx. 980 million USD (2025 estimate)

Source: Kazakhstan National Bureau of Statistics, 2026 Q1; Eurasian Economic Commission Trade Database, April 2026

Product Category Breakdown

Athletic leisure shoes are the fastest-growing category among Kazakhstan's footwear imports, with their share rising to about 42% in 2026. Leather shoes and boots account for about 35% combined, significantly influenced by seasonal factors. Below is the category structure and price range of imported footwear in 2025:

Category	Import Share	CIF Price Range
Athletic leisure shoes	approx. 42%	6.5-15 USD/pair
Leather/Formal shoes	approx. 20%	12-28 USD/pair
Boots (incl. winter boots)	approx. 15%	14-35 USD/pair
Sandals/Slippers	approx. 13%	3-9 USD/pair

Source: Eurasian Economic Commission, 2025 Classified Trade Data; 2026 Q1 uses previous values, no latest public data

Core Finished Product Supply and Demand

Athletic leisure shoes, as the core finished product in Kazakhstan's footwear market, are seeing a widening supply-demand gap in 2026. There is almost no large-scale athletic shoe production line locally, with all demand met by imports. China's supply share in this category is as high as about 72%, with Vietnamese and Indonesian brands entering in small volumes through Turkish agency channels.

Annual athletic shoe imports: approx. 17.2 million pairs 18.3%

China supply share (athletic shoes): approx. 72%

Local capacity gap: over 16.5 million pairs ▲ Completely import dependent

Source: General Administration of Customs of China, April 2026; Kazakhstan Light Industry Association, 2026 Q1 Industry Brief

Intermediate Goods and Raw Material Value

Raw materials account for about 55%-65% of footwear production costs. Prices for shoe-grade leather, EVA midsoles, and rubber outsoles in Chinese production areas fluctuated slightly in H1 2026. Kazakh importers have increased inquiries for Chinese shoe material intermediates (such as soles, upper semi-finished products), reflecting small-scale local assembly attempts.

Raw Material/Intermediate	China Production Price	Kazakh Import Intended CIF Price
PU synthetic leather for shoes	approx. 18 CNY/m	approx. 3.2 USD/m
EVA sole sheet	approx. 9 CNY/pair	approx. 1.6 USD/pair
Rubber outsole	approx. 7 CNY/pair	approx. 1.2 USD/pair

Source: 生意社, June 2026 Light Industry Material Quotations; 卓创资讯, May 2026 Rubber & Plastic Section (using previous values)

Trade and Macro Indicators

Kazakhstan's GDP growth was about 4.2% in 2025, remaining steady in Q1 2026. The tenge/USD exchange rate fluctuated between about 450-475:1 in H1 2026. Under the Eurasian Economic Union framework, footwear import tariffs are about 5%-10%, with Chinese products enjoying MFN treatment. Below are the core macro indicators:

Indicator	Value	Period
GDP growth	approx. 4.1%	2026 Q1
Tenge/USD exchange rate	approx. 462:1	June 2026
Footwear import tariffs	5%-10%	EAEU Unified Tariff
Population	approx. 20.3 million	2026 estimate

Source: World Bank, April 2026 Update; National Bank of Kazakhstan, June 2026 Exchange Rate Bulletin

Risks and Opportunity Windows

Key risks include tenge exchange rate volatility (depreciated by about 6% in 2026) and Kazakhstan's ongoing import substitution policies. The opportunity window lies in Chinese footwear companies mitigating tariff impacts through local warehousing and brand cooperation, while athletic leisure categories still have a 15%-20% penetration increase potential among young consumers.

- △ Exchange rate risk: The tenge has depreciated about 6% against USD in 2026
- △ Policy risk: Kazakhstan plans to raise footwear localization rate to 20%
- Opportunity: Athletic shoe demand grows 12% annually, with large brand cooperation potential
- Bilateral cooperation: Improved customs clearance efficiency at Horgos port for footwear

Source: National Bank of Kazakhstan, June 2026; Ministry of Industry and Infrastructural Development of Kazakhstan, 2026 Industrial Policy Document

Data Sources Summary

- Kazakhstan National Bureau of Statistics — 2025 Annual Report / 2026 Q1 Trade Brief
- General Administration of Customs of China — April and May 2026 Monthly Statistical Bulletins
- Eurasian Economic Commission (EEC) — 2025 Classified Trade Database
- World Bank — Kazakhstan Macro Data, April 2026 Update
- National Bank of Kazakhstan — June 2026 Exchange Rate Bulletin
- 生意社 — June 2026 Light Industry Material Quotations

7. 卓创资讯 — May 2026 Rubber & Plastic Section Data
(using previous values)

9. Ministry of Industry and Infrastructural Development
of Kazakhstan — 2026 Industrial Policy Document
8. Kazakhstan Light Industry Association — 2026 Q1 Ind
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